



ancoraDocs

Operator Guide Version 9.1

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Introduction

ancora Software provides specially designed software tools to eliminate both the costs and errors of processing documents in various all types of paper and electronic formats. Integral exception-handling tools automatically flag incorrect or missing data, so that you can put more focus on issues that improve the efficiency of your workflows.

Your Ancora administrator has given you access to an operator account.

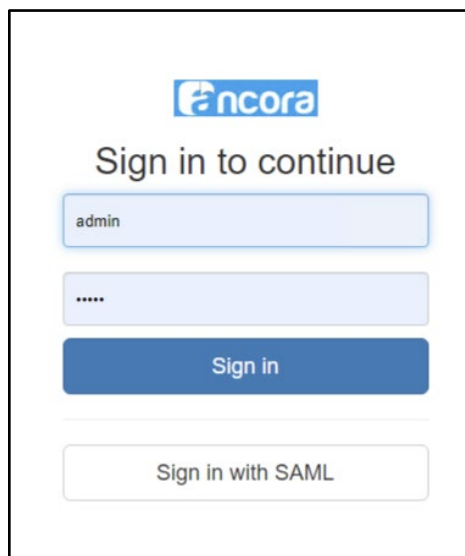
The **ancoraDocs** web application is readily accessible through any modern Internet browser. The application is specifically tested for compatibility with:

- Google Chrome
- Microsoft Edge

Log in to your Ancora account

To access the application, enter the URL provided by your system administrator.

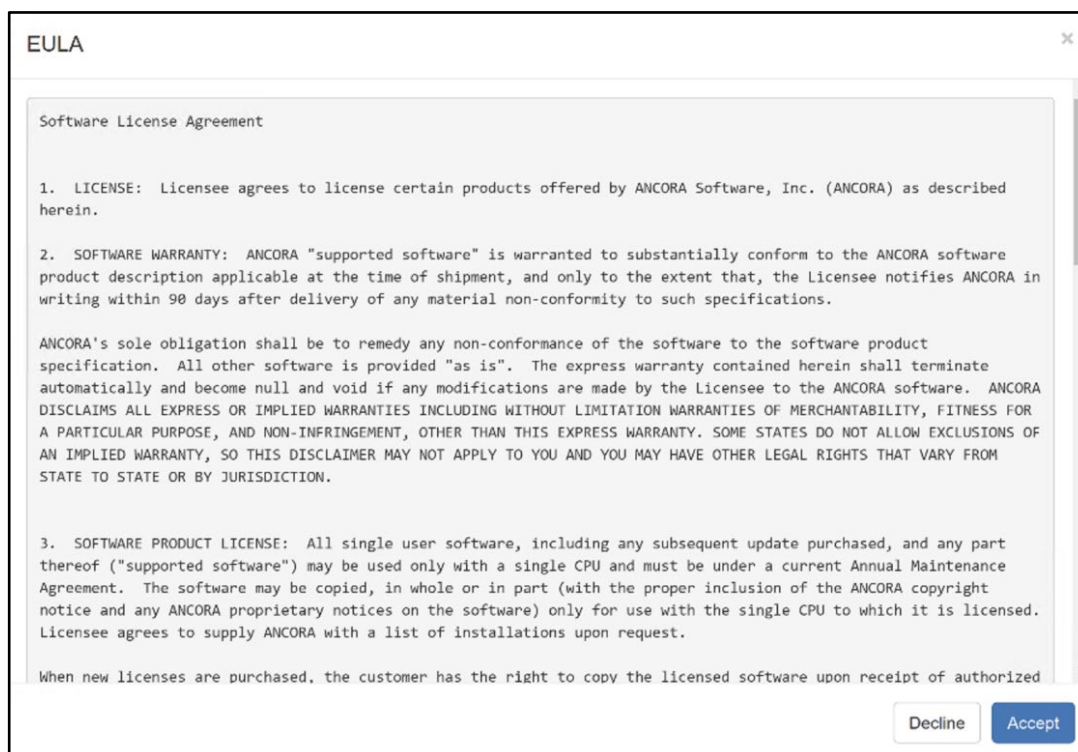
After entering the URL provided by your Ancora administrator, you'll see a login page similar to what is shown in the figure below. Enter your username and password which have been given by your system administrator, then click on the **Sign In** button.



The image shows the 'Sign in to continue' screen for the Ancora software. At the top is the Ancora logo. Below it, the text 'Sign in to continue' is centered. There are two input fields: the first is labeled 'admin' and the second is masked with six dots. Below these fields is a blue 'Sign in' button. At the bottom, there is a light blue button labeled 'Sign in with SAML'.

Enter the **Username** and **Password** for your Ancora operator account.

After logging in for the first time, a popup window will appear containing the software license agreement. Click the **Accept** button to agree to the terms and close the popup window.



The image shows a 'EULA' (End User License Agreement) popup window. The title bar says 'EULA'. The main content area is titled 'Software License Agreement' and contains the following text:

1. LICENSE: Licensee agrees to license certain products offered by ANCORA Software, Inc. (ANCORA) as described herein.

2. SOFTWARE WARRANTY: ANCORA "supported software" is warranted to substantially conform to the ANCORA software product description applicable at the time of shipment, and only to the extent that, the Licensee notifies ANCORA in writing within 90 days after delivery of any material non-conformity to such specifications.

ANCORA's sole obligation shall be to remedy any non-conformance of the software to the software product specification. All other software is provided "as is". The express warranty contained herein shall terminate automatically and become null and void if any modifications are made by the Licensee to the ANCORA software. ANCORA DISCLAIMS ALL EXPRESS OR IMPLIED WARRANTIES INCLUDING WITHOUT LIMITATION WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT, OTHER THAN THIS EXPRESS WARRANTY. SOME STATES DO NOT ALLOW EXCLUSIONS OF AN IMPLIED WARRANTY, SO THIS DISCLAIMER MAY NOT APPLY TO YOU AND YOU MAY HAVE OTHER LEGAL RIGHTS THAT VARY FROM STATE TO STATE OR BY JURISDICTION.

3. SOFTWARE PRODUCT LICENSE: All single user software, including any subsequent update purchased, and any part thereof ("supported software") may be used only with a single CPU and must be under a current Annual Maintenance Agreement. The software may be copied, in whole or in part (with the proper inclusion of the ANCORA copyright notice and any ANCORA proprietary notices on the software) only for use with the single CPU to which it is licensed. Licensee agrees to supply ANCORA with a list of installations upon request.

When new licenses are purchased, the customer has the right to copy the licensed software upon receipt of authorized

At the bottom right of the window are two buttons: 'Decline' and 'Accept'.

User Preferences

Change your password

You can change your password at any time. Click your username, then click **Change Password** and follow the prompts in the popup window.

The minimum password requirements are 8 characters and 3 out of the 4 following character sets:

- 1 lowercase character
- 1 uppercase character
- 1 special character
- 1 number

Change password

Current password

New password

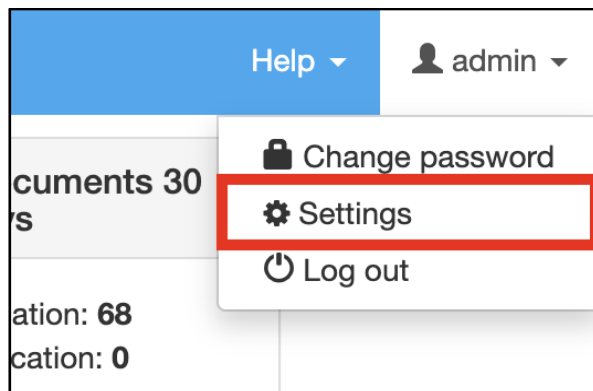
Confirm new password

Cancel

Save

User settings

Click the user menu and then click **Settings**.



In the popup window, you can change the display language and also configure **Image View** and **Layout Mode** settings.

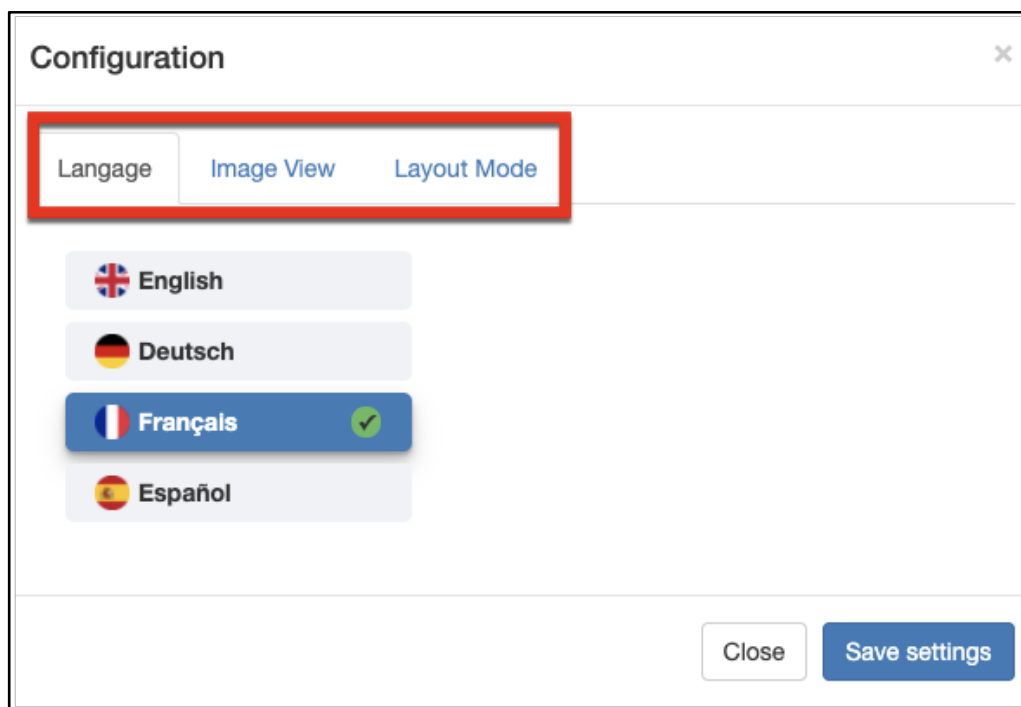
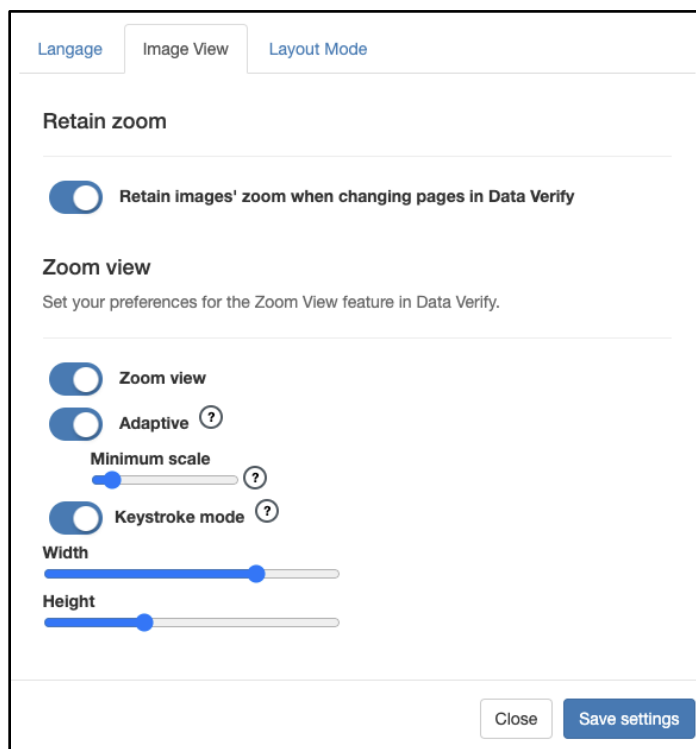


Image View

Click the **Image View** tab to view those settings.



The image view settings apply to the document view in Data Verification:

- **Retain zoom** — retains the zoom level when you view different documents within the same batch.
- **Zoom view** — If this toggle is ON, it is possible to zoom in and out on the document view.
- **Adaptive** — If this toggle is ON, when moving the focus from one data field to another, the zoom level will remain the same but the document view will move to the region containing the data that was captured.
- **Minimum scale** — Move the slider to adjust the minimum amount of zoom to be applied.
- **Keystroke mode** — If this toggle is ON, you can hold down Alt+Z to zoom in closely in the document view to the region containing the data that was captured.
- **Width** — Move the slider to adjust the width of the zoom, relative to the **Height**.


- **Height** — Move the slider to adjust the height of the zoom, relative to the **Width**.

Layout Mode

Click the **Layout Mode** tab to view those settings. Previously, these settings were available directly in the user menu. The layout mode settings apply to the document view in Data Verification.

Langage
Image View
Layout Mode

Set your preferred layout size in Data Verify.

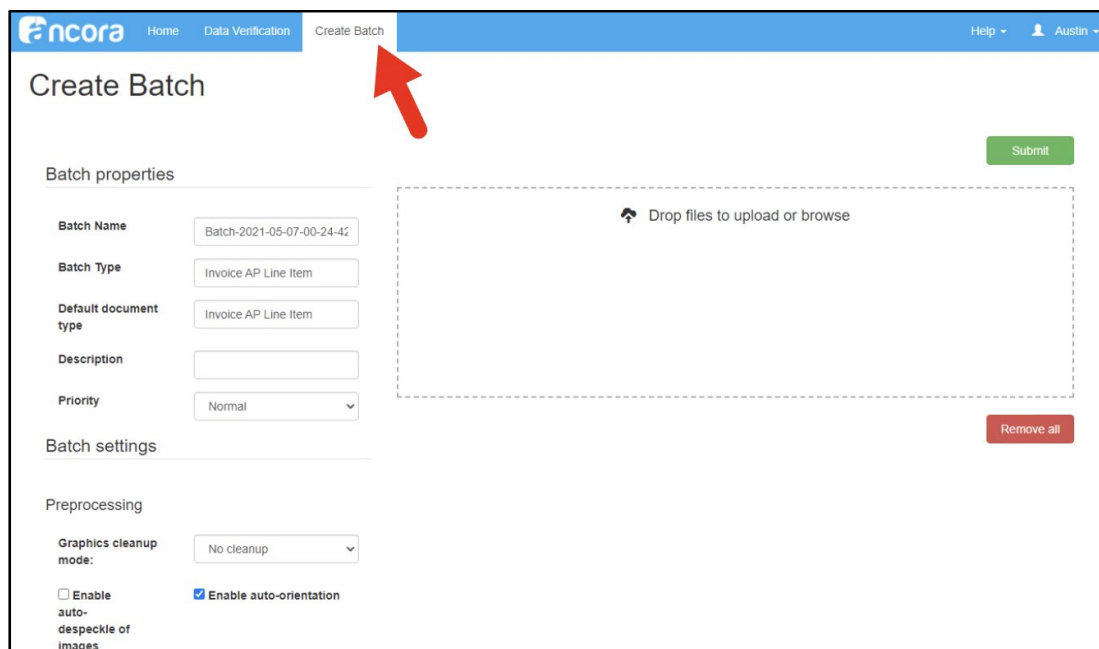
Normal
Compact 

EXAMPLE
Tax
Total

Close
Save settings

Create a Batch

The Create Batch page allows users to upload files and create a batch directly from within the web browser.



Set Batch Properties

There are a number of batch properties that you can set:

- **Batch Name** — The default name is the current date and time stamp of when the page is first accessed within the user's current session. You can edit this name.
- **Batch Type** — You must choose a batch type, which will also set the default **Document Type**. If other document types are available, choose the appropriate type.
- **Priority** — The default priority is **Normal**. Choose a priority that matches the urgency of this batch. A higher priority setting will move the batch in front of other batches that are already in process.
- **Description** — Optionally, enter a description of this batch.

Batch Settings

Below the Batch Properties section, you'll find Batch Settings. These settings determine preprocessing and document separation.

Preprocessing Settings

These settings determine the image optimization properties that are applied during the image processing. In most cases, the default settings will work well for most users.

- **Graphics clean up mode** — Removes various types of anomalies from scanned images, such as hole punches, discoloration, and other extraneous markings. There are three possibilities here, **Normal**, **No cleanup (default)**, and **Aggressive**. Typically, the Ancora system is quite good in automatically removing anomalies from scanned images, so the default setting is fine for most users.
- **Enable auto-despeckle of images** — Removes any black speckles that may appear from scanned documents.
- **Enable auto-rotation** — the image will be automatically rotated to portrait orientation.
- **Enable auto-orientation** — the image will automatically adjust a scanned image to a precise vertical alignment.
- **Keep blank pages** — Check this box if you want to keep blank pages.

Basic document separation

These settings determine how documents will be split within the batch. These settings determine the context in which both the classification engine will determine the document type if it should attempt to perform document separation.

Enable document separation — By default, this box is checked.

Uncheck this box to have the Classification engine determine where the document boundaries are set. The Classification will look for patterns and automatically set document boundaries.

If this box is checked, the system will create document boundaries according to the option chosen in **Separation Mode**:

- **1 Document = 1 File** — Each PDF or image file corresponds to one document in a batch.
- **Check-based merge** — This option does not work in the Create Batch Screen. It does work in the Input Service and Scan Client.
- **Fixed page count per document** — The system will create a document break every X number of pages. Click the **Settings** button to specify the number of pages per document.
- **Process only first X and last Y pages** — check this box to have the system only focus on the pages of the document that fit into this range.

Batch settings

Preprocessing

Graphics cleanup mode: No cleanup

☐ Enable auto-despeckle of images
 ☒ Enable auto-orientation

☒ Enable auto-rotation
 ☐ Keep blank pages

☒ Extract vector PDF data if present

Basic document separation

☒ Enable document separation

Separation mode: 1 Document = 1 File Settings

Note: For optimal performance use documents scanned at 300dpi with minimal or no compression. PNG format and greyscale are advisable.

☐ Process only first 3 and last 1 pages

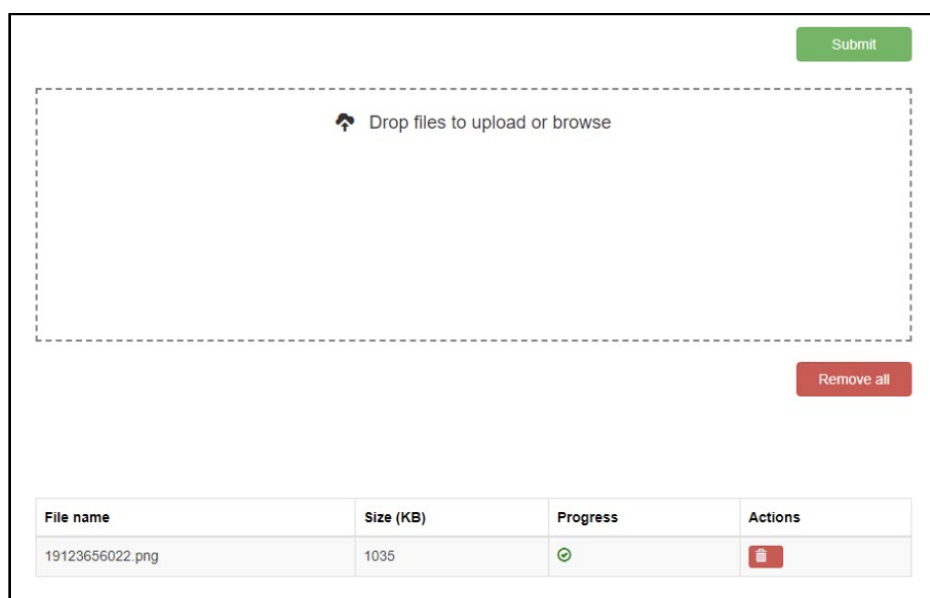
Add Files

Acceptable file format include:


- PDF
- PNG
- JPG
- BMP
- GIF
- TIF and TIFF

Follow these steps to add files to the batch:

1. Drag-and-drop the files into the dropzone on the right side of the Create Batch page. Or, click into the dropzone to browse and select a file.
2. Accept the default **Batch Name**, or enter your own name. Choose a **Batch Type** from the drop-down menu.
3. To remove files and add other files, click the **Remove all** button.
4. Verify that all of the files have been uploaded by checking the **Progress** column. There should be a green checkmark for each file.
5. Verify that your settings for these files are correct.
6. Click the **Submit** button to submit the batch.

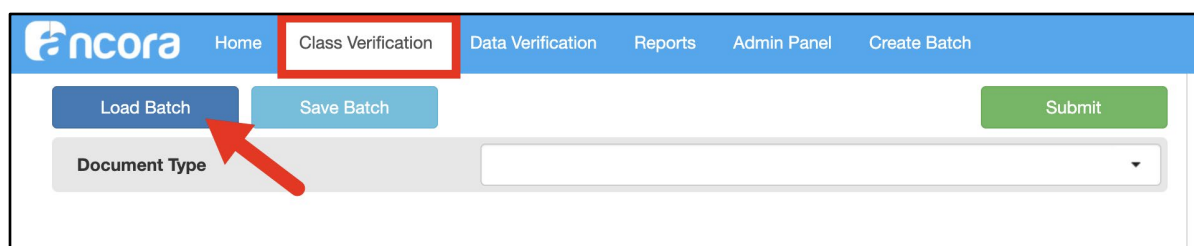


The interface shows a file upload area with a dashed border and the text "Drop files to upload or browse" with a cursor icon. A green "Submit" button is in the top right, and a red "Remove all" button is in the bottom right. Below the dropzone is a table with the following data:

File name	Size (KB)	Progress	Actions
19123656022.png	1035	✓	

Class Verification

In Class Verification, an operator reviews the documents the system classified with low confidence. If your administrator has given you access to this module, you can process such documents. Click the **Class Verification** link at the top.



Loading a batch

The administrator may have configured your account for automatic batch loading. If so, either the oldest batch or batch with the highest priority will automatically load when you click the **Load Batch** button. Skip ahead to the next section.

If your administrator has configured permissions to choose batches, click the **Load Batch** button to display the Select a batch popup window. Here, the operator can sort and filter the batches according to the most urgent need or the direction of a supervisor. Select a batch by double-clicking on it in the list. Or, clicking once on the batch and pressing the **Load** button at the bottom of the popup.

Select a batch ×

Batch Name	Type	Priority	Documents	Pages	Created On 📅	Created By	Updated On	Description	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
Orion-46	Orion Lending	3	75	101	10/25/2017 11:17 am	Admin	12/27/2017 12:43 am		b672cca7
Batch-17-10-25-13-5	Orion Lending	3			10/25/2017 01:53 pm	ancoraAdmin	12/27/2017 02:03 am		4cb759a1
Orion-47	Orion Lending	3			10/25/2017 04:33 pm	Admin	12/27/2017 07:04 pm		7a950c71
admin-1	Caltech Invoice	3			10/26/2017 07:36 am	Admin	12/27/2017 07:02 pm		4c16f221
admin-3	Caltech Invoice	3			10/26/2017 07:36 am	Admin	12/27/2017 07:02 pm		dac3ce77
admin-18	Caltech Invoice	3			10/26/2017 07:47 am	Admin	12/27/2017 07:02 pm		ad48b701
admin-20	Caltech Invoice	3			10/26/2017 07:47 am	Admin	12/27/2017 07:02 pm		280681e3
admin-21	Caltech Invoice	3			10/26/2017 07:47 am	Admin	12/27/2017 07:02 pm		d1b3929c
admin-23	Caltech Invoice	3			10/26/2017 07:47 am	Admin	12/27/2017 07:02 pm		83532c71
admin-26	Caltech Invoice	3			10/26/2017 07:48 am	Admin	12/27/2017 07:02 pm		95371e91

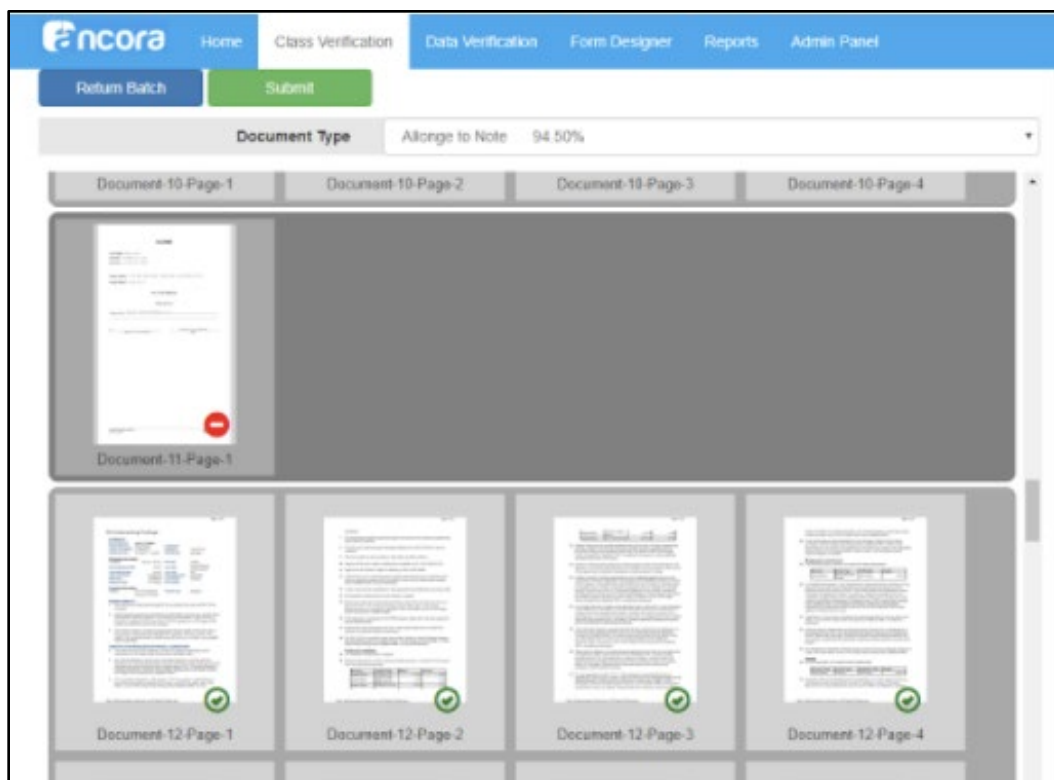
Verifying Documents

Documents are classified relative to a confidence threshold, which can be set by the administrator. The default value is 95%. Any documents that the system does not assess to be at a level of confidence above this threshold will be designated as low confidence.

The system assesses document confidence by examining physical attributes such as logos, images, colors, barcodes, and fonts. It also considers semantic content associated with keywords and phrases.

When a batch loads, the first low-confidence document appears at the top.

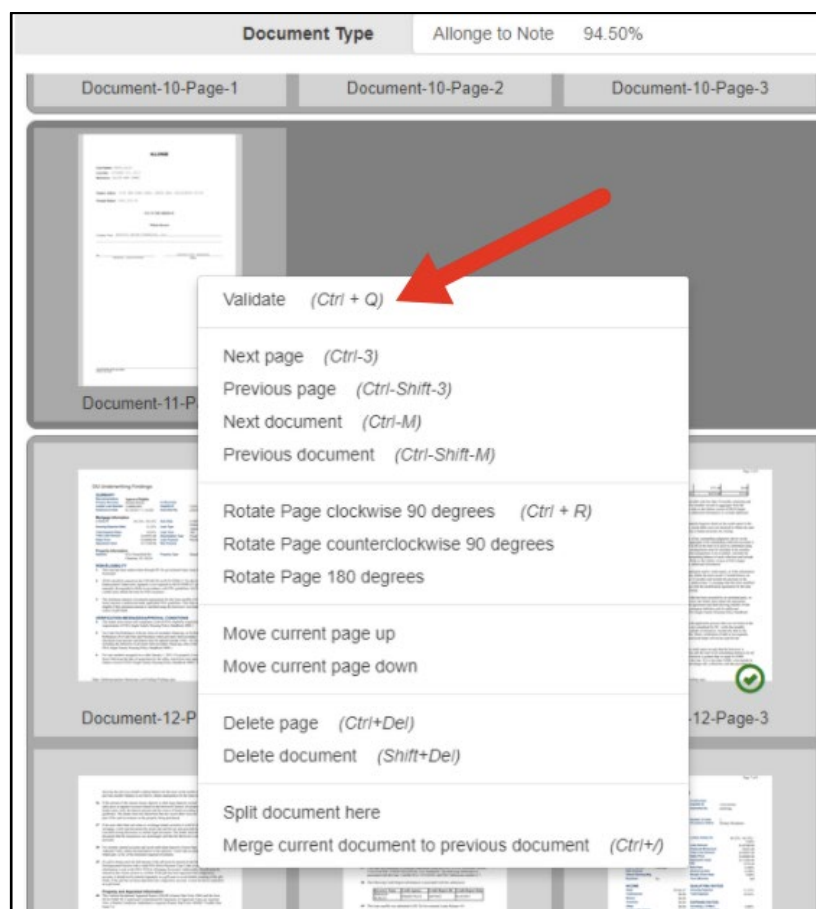
The sections below explain the various tasks that you, as an operator, may need to perform to verify low-confidence documents.



Accept the Document Type

To accept the document type that the classification engine assigns, press the keyboard shortcut **Ctrl+Q**, or right-click over the document thumbnail and choose **Validate** from the menu.

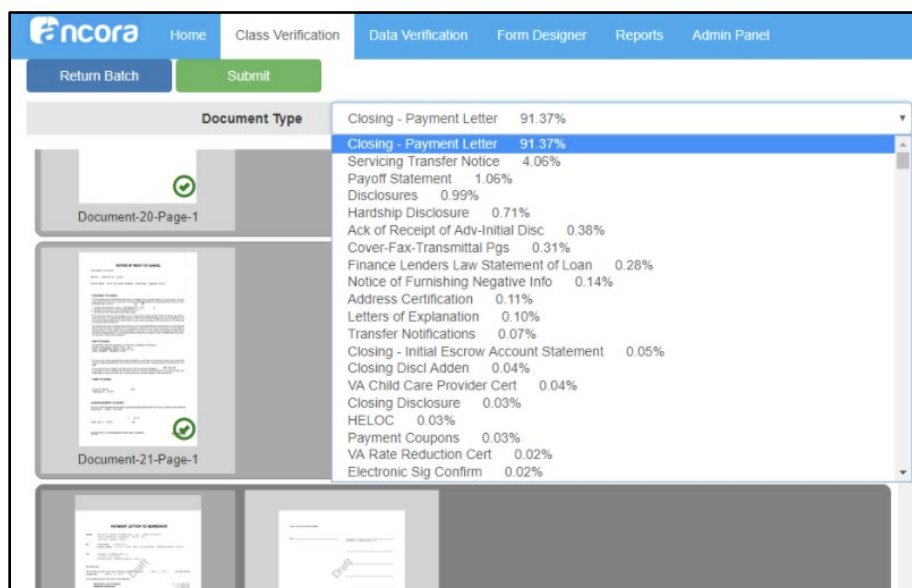
NOTE: Hold down the shift key to select multiple pages, then right-click to see the context menu.



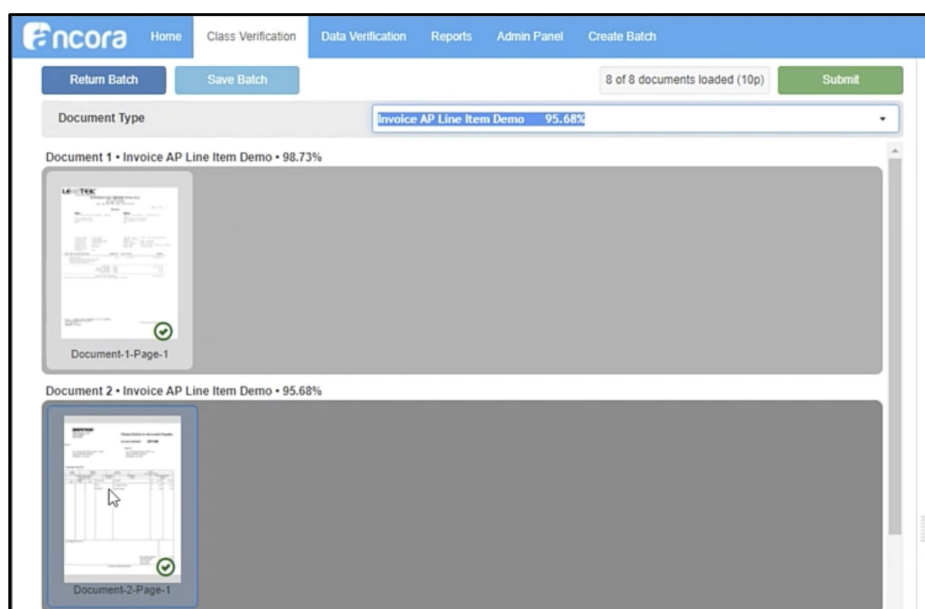
Doing so changes the confidence score to 100%, assigns a green check mark, and presents the next low confidence document.

Change the Document Type

To change the document type, click the **Document Type** drop-down at the top of the page and choose the document type. Note that the document types in the list are ordered according to the level of confidence, and then alphabetically.



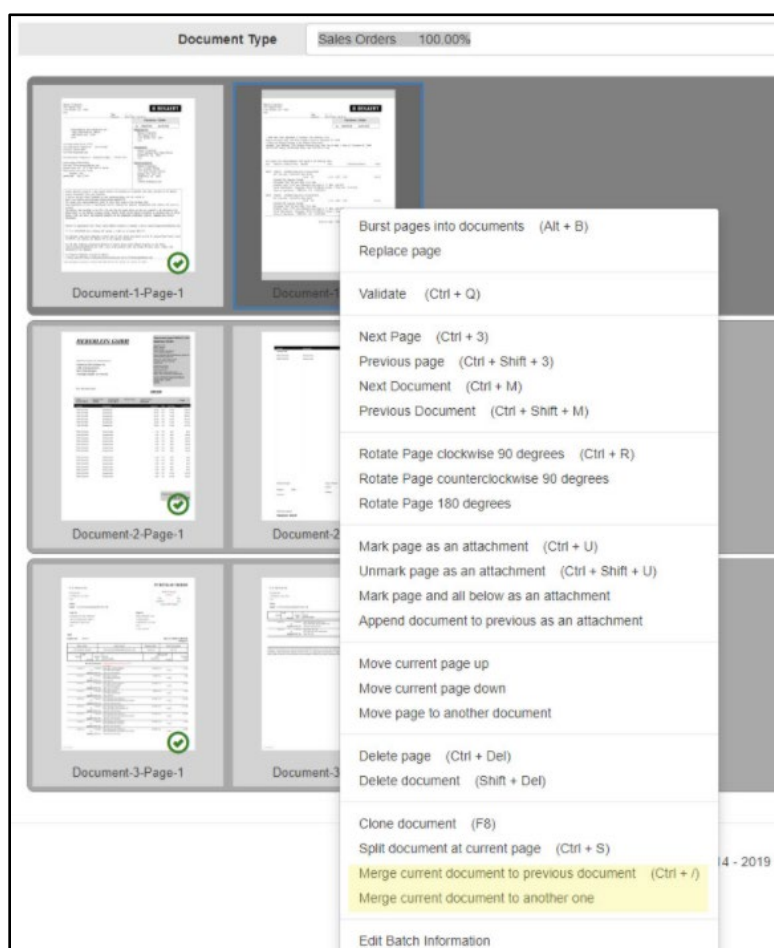
When the menu opens, the operator can begin typing the document type to navigate to it more quickly. After selecting the new document type, the document will have a confidence of 100% and a green check mark.



Merging Documents

To merge two documents, use the keyboard shortcut **Ctrl+I**. Or, right-click over the second document and choose **Merge document with the previous one** from the menu.

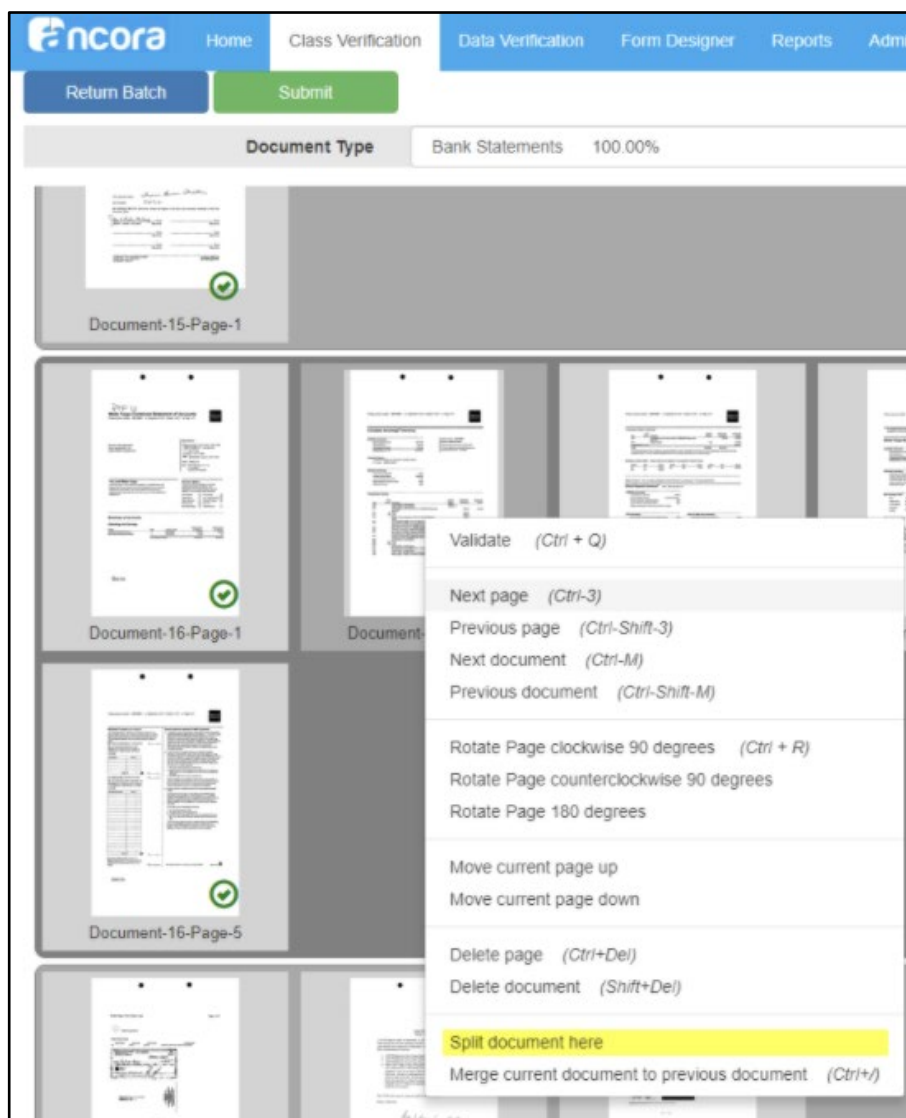
You can also choose to merge any two documents. Right-click over one document, then choose **Merge Current Document with Another One** to select whatever other document you want to merge. The pages of the current document will be appended to the bottom of the selected document.



Alternatively, you can click and drag a page from one document to another document to merge the pages into a document. To select multiple pages at a time hold down the Ctrl key as you click on each page.

Split the Document

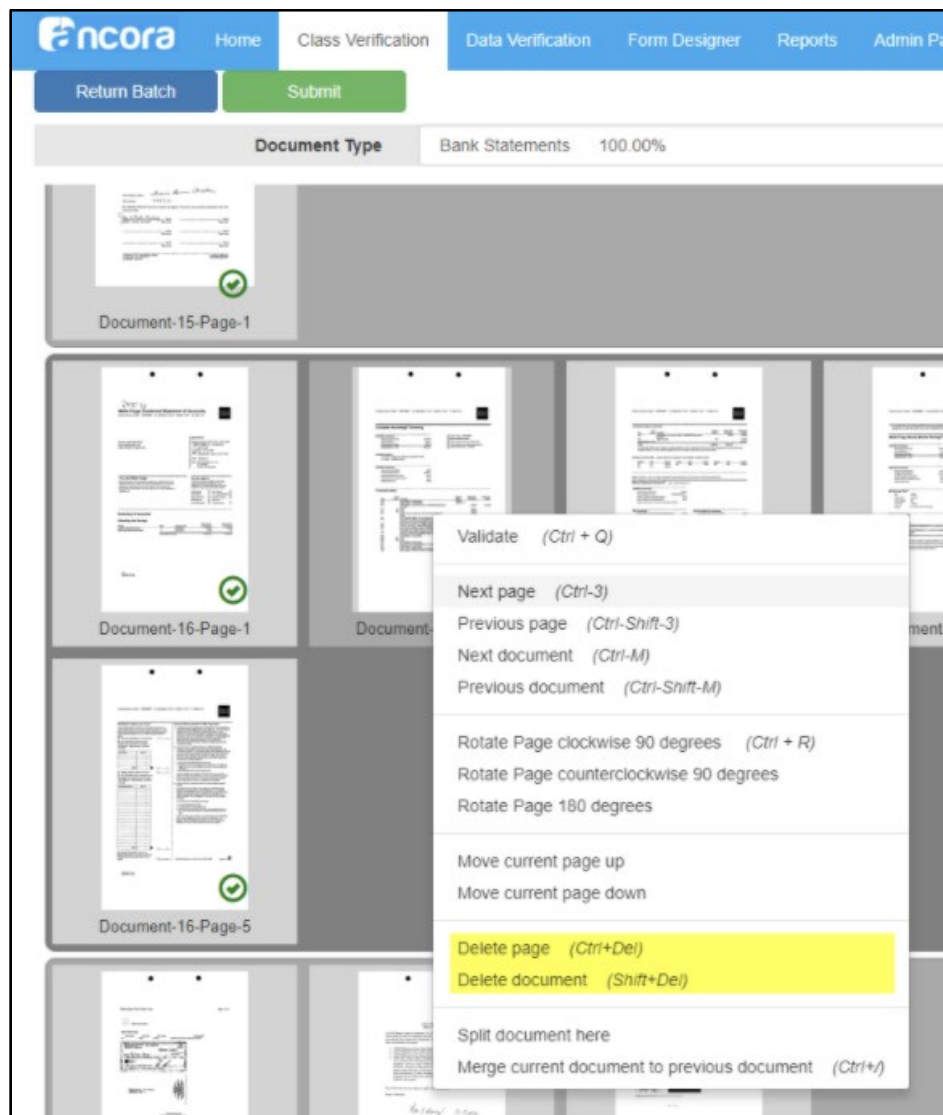
To split documents, click on the first page that needs to be split from the current document, right-click and choose **Split Document here** from the menu. Or, use the **Ctrl+S** keyboard shortcut.



Alternatively, you can click and drag a page from a document to a new document by clicking on the page and holding down the left click button on the mouse while moving the cursor to the white space between documents. This will cause a new document frame to appear. When the frame appears, release the left click. To select multiple pages at a time hold down the Ctrl key as you click on each page. Then release the left click button when the new document frame appears.

Delete a page or delete an entire document

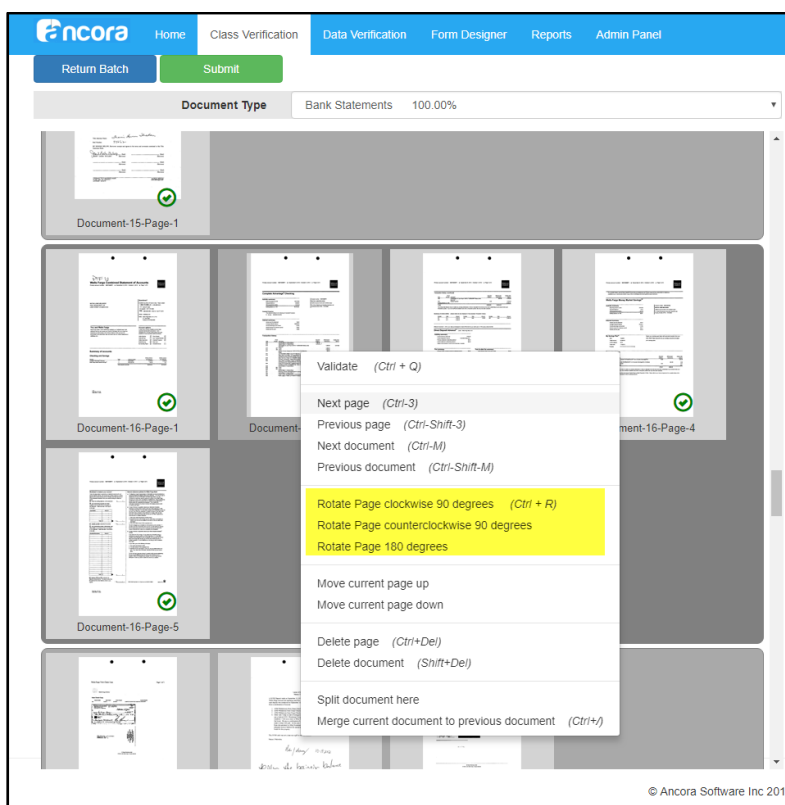
To delete only a page, click on the page and then press the keyboard shortcut **Ctrl+Del**—or use the right click menu option. To delete a entire document, click on any page in the document and then press the keyboard shortcut **Shift+Del**—or use the right-click menu option.



Rotate a page

To rotate a page 90 degrees to the right (clockwise), click on the page and then press the keyboard shortcut **Ctrl+R**.

More options are available. Right-click over a page and choose one of the rotation options: rotate the image clockwise or counterclockwise 90 degrees, or rotate the page 180 degrees.

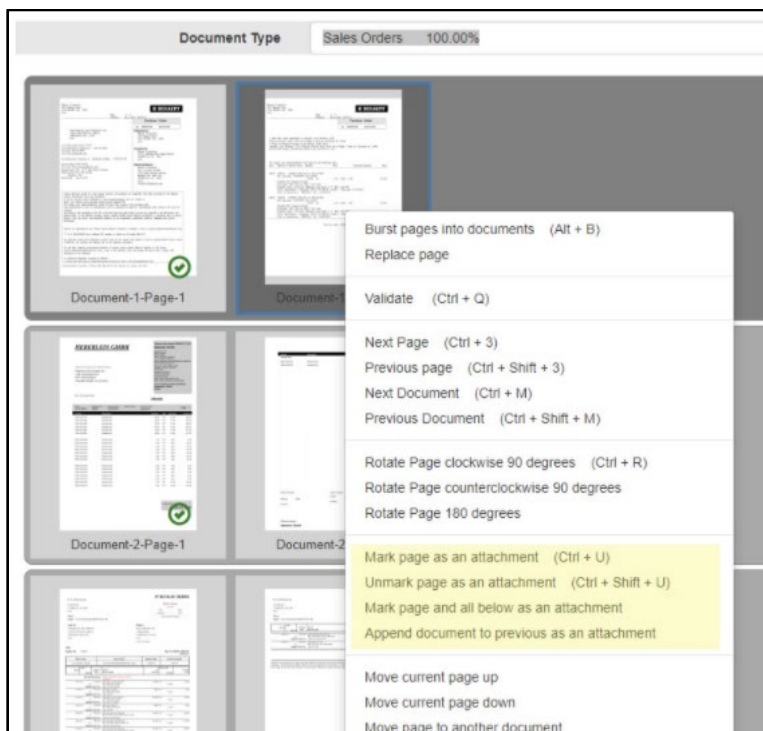


Mark a page as an attachment

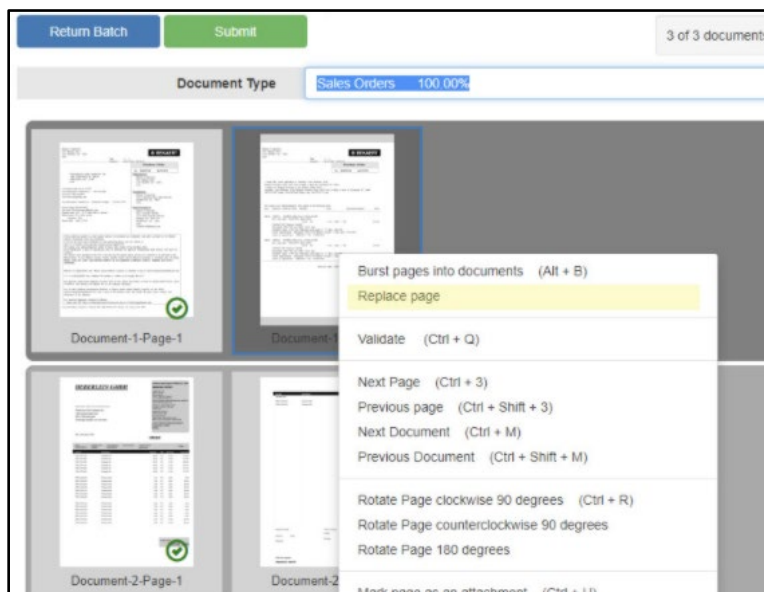
There are several reasons why you might want to mark a page as an attachment:

- It is necessary to keep information as supporting documentation, but you don't need to capture any data. Typical attachments include terms and conditions or privacy disclosures.
- Improves data capture efficiency since the system won't attempt to capture data from attachment pages.
- Pages marked as an attachment don't count against your volume license.

To mark one or more pages as an attachment, use the keyboard shortcut **Ctrl+U**. To unmark a page that is an attachment, pressing **Ctrl+Shift+W**. Or, use one of the items in the right-click context menu.

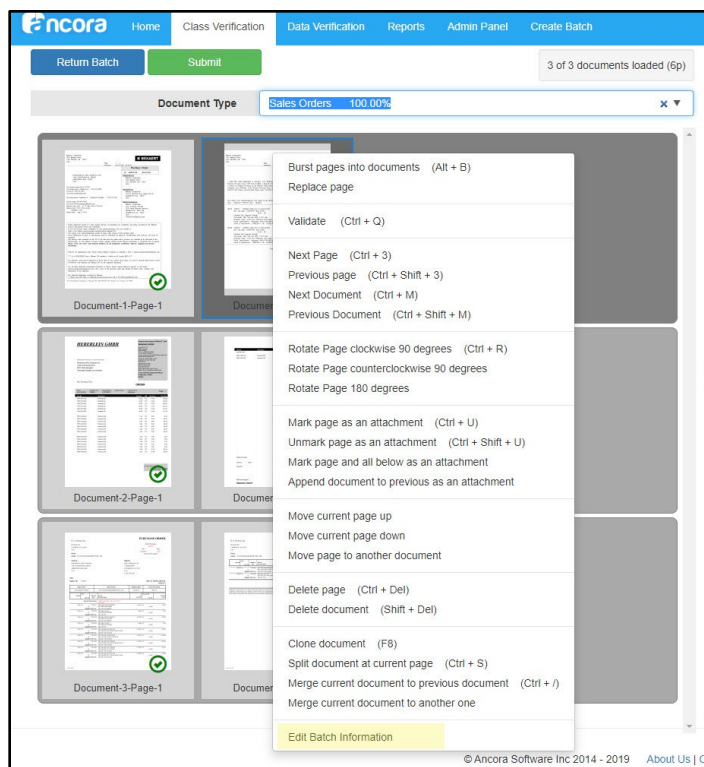


Replacing a Page

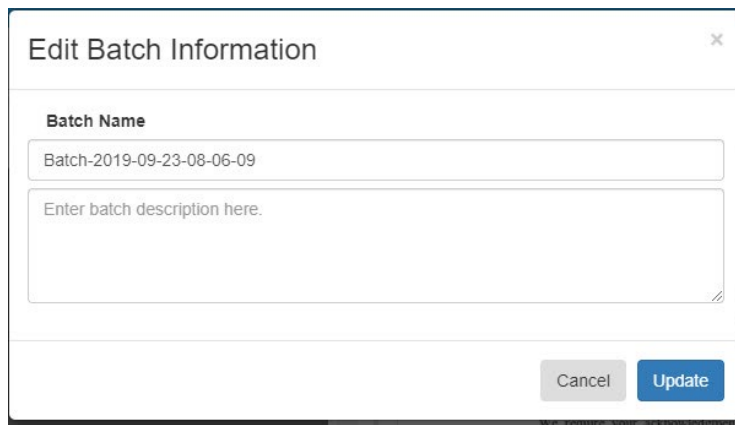


Edit Batch Information

Anywhere on the page, right-click to view the context menu and then click **Edit Batch Information**.



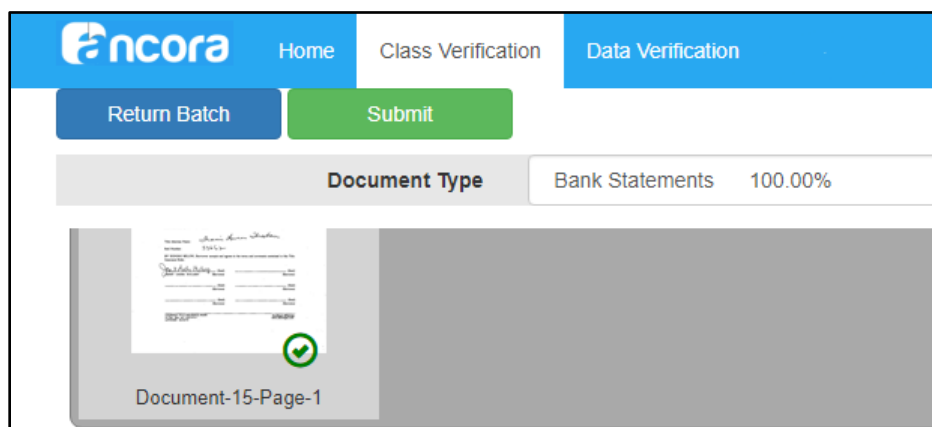
In the popup window, you can change the **Batch Name** and optionally enter a description. Click the **Update** button in the popup then press the save batch button to fully apply the change.



The image shows a popup window titled "Edit Batch Information" with a close button (X) in the top right corner. Inside the window, there is a section labeled "Batch Name" with a text input field containing "Batch-2019-09-23-08-06-09". Below this is a larger text area with the placeholder text "Enter batch description here." and a small icon in the bottom right corner. At the bottom right of the window, there are two buttons: "Cancel" and "Update".

Submit a Batch

Class verification is complete when all of the documents in the batch contain a green check mark. At the top of the page, click the **Submit** button to send the batch on to the next step in the process.



The image shows the main interface of the AncoraDocs Web Operator Guide. At the top, there is a blue header with the Ancora logo and three tabs: "Home", "Class Verification", and "Data Verification". Below the header, there are two buttons: "Return Batch" (blue) and "Submit" (green). Below these buttons, there is a section labeled "Document Type" with a dropdown menu showing "Bank Statements" and a progress indicator "100.00%". Below this, there is a large gray area containing a document preview of "Document-15-Page-1" with a green checkmark icon in the bottom right corner.

Data Verification

In Data Verification (or Data Verify), the operator verifies the results of the data capture process and trains the system to learn where data exists on the documents so that it can capture the data more effectively the next time.

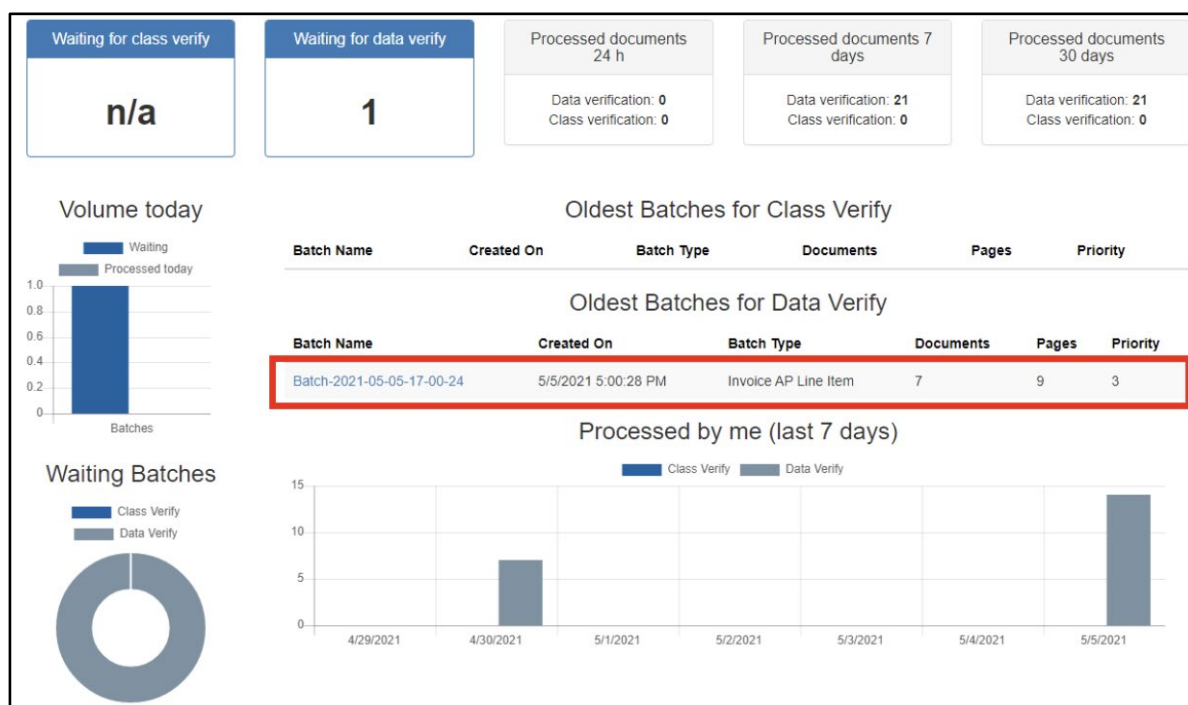
The screenshot below shows the default page for Data Verify. In order for the operator to begin processing, the operator needs to press the Load Batch button.

Loading a Batch

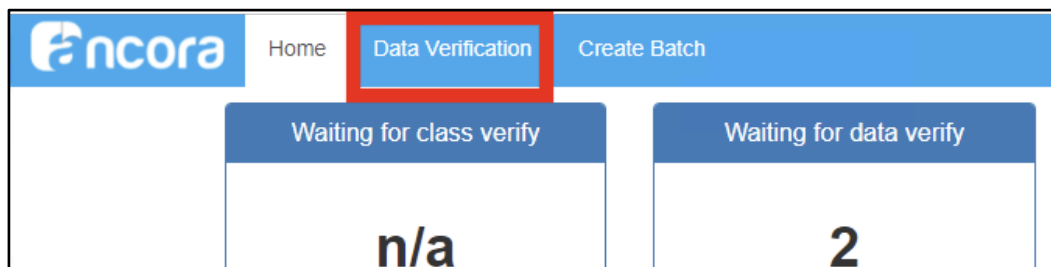
According to the user permissions of the operator, the batch selection menu will load OR the oldest batch having the highest priority will automatically load.

There are two ways to load a batch:

1. **Dashboard** — The oldest batches having the highest priority will appear on your dashboard.



2. **Data Verification** — This top level menu item is shown in the blue ribbon at the top of the page.



Click on the **Data Verification** item in the top menu, click the **Load Batch** button.

User permissions govern this feature. When the Batch page opens, the user may see either a single batch screen or a list of batches that appear in a popup.

Selecting a Batch

In the batch list popup, you can sort and filter the batches. To sort, click on the column once to sort the column in an ascending order, and click again to sort in descending order. To filter the batch list, enter a value into the blank field above one or more columns and press the Enter key.

Tip: Filters are sticky, in that adjustments to a filter will persist and appear in all future user sessions.

Select a batch by double-clicking on the batch or by clicking once on the batch and pressing the **Load** button.

At the bottom of the batch selection window, there is a field for searching all of the capture data in all of the documents in all of the batches. Enter a search term and hit the Return key to filter the list to view all batches containing documents with at least one match to the search value. Matches are only possible on capture fields.

For example, searching on “Acme Corp” in the bottom filter will return a list of all the batches containing documents where “Acme Corp” has been identified as a **Vendor Name** value, if **Vendor Name** has been defined as a capture field.

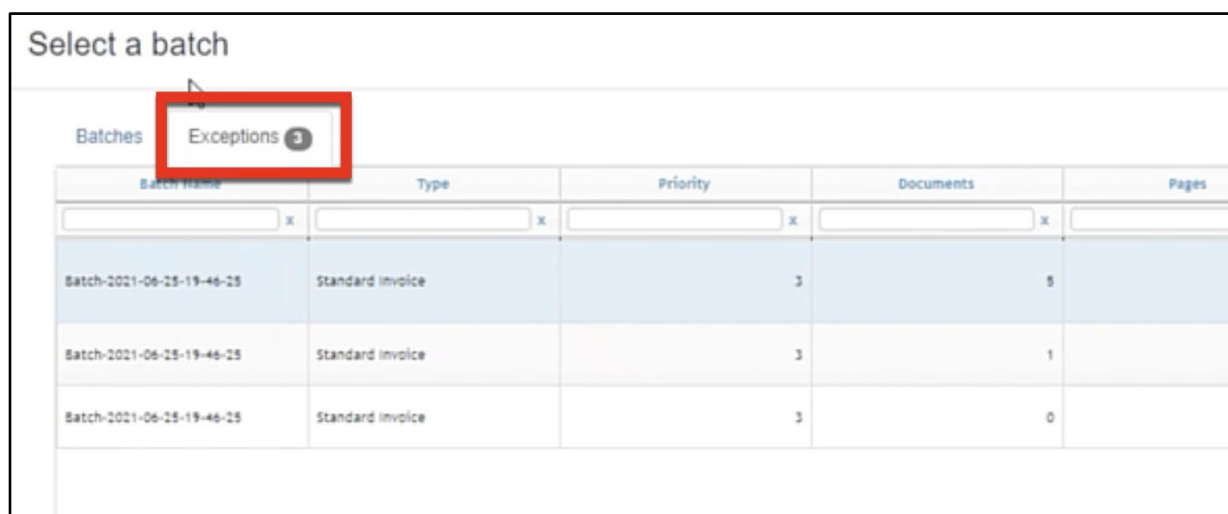
Select a batch

Batch Name	Type	Priority	Documents	Pages	Created On	Created By User	Updated On	Description	Batch #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Batch-2021-05-05-1	Invoice AP Line Item	3	7	9	05/05/2021 05:00 p	Admin	05/06/2021 11:20 p		666b3bf2-3916-4ae9-
Batch-2021-05-06-2	Invoice AP Line Item	3	1	1	05/07/2021 12:20 a	Austin	05/13/2021 04:58 p		40635ef0-6be1-4d00-

Double-click on a batch name to load it, or click once and then click the **Load** button in the bottom-right of the popup window.

Exceptions tab in Select a batch

If an operator has the **ResolveExceptions** permission and clicks the **Load Batch** button in Data Verification, an **Exceptions** tab will appear in the Select a batch popup window. From here you can click on a batch to load the batch and review it.



The exceptions tab at Data Verify allows users with the new permission the ability to process batches that contain documents normal verify users have identified and set as an exception.




Validating a Batch

Batches often contain many documents. A white space will appear between each document boundary.

The first page of the document will be highlighted on the left, and the capture fields will appear in the middle, and the document view appears on the right.

Page thumbnail icons

A colored icon will appear on each document thumbnail:

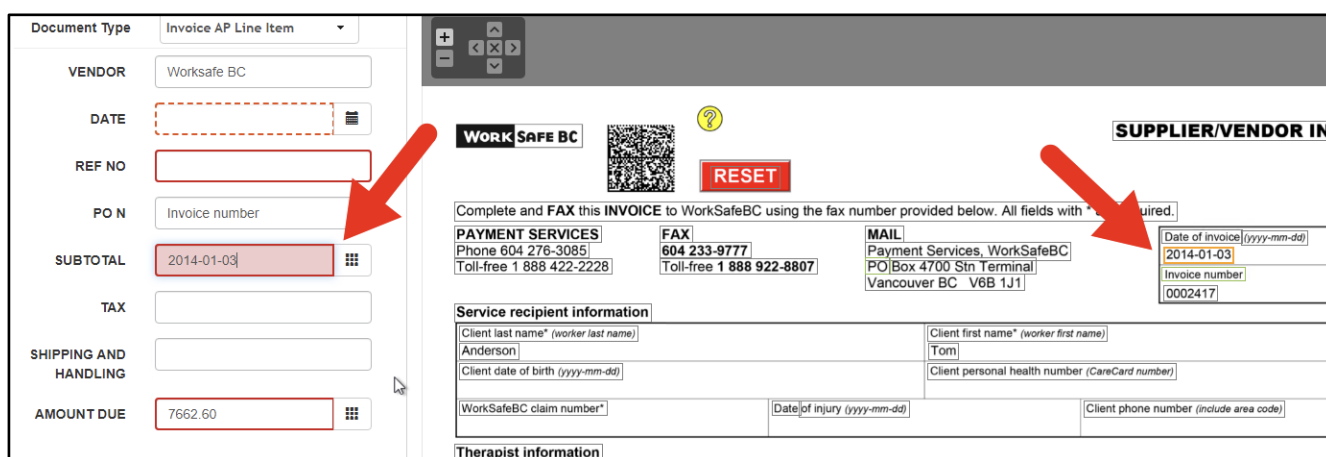
- A green check mark  indicates all required fields are populated and all fields have been validated to ensure they comply with the expected data format and or any formulas and calculations associated with the field.
- A yellow caution icon  indicates there is at least one field that is invalid, but the user can accept the invalid value. This is known as a soft-validation stop. See the definitions below.
- A red warning  indicates at least one required field is missing or at least one field has a hard validation stop. See the definitions below.

There are two shortcuts:

- **Ctrl-Q** — Accepts the soft validation value in the data field that has the focus.
- **Alt-V** — Accepts all of the soft validation values in the entire document.

Examining the capture fields

If you click into each of the capture fields in the middle panel, you'll notice that the background for the field of focus is either green or red. An orange box will appear in the document panel over the corresponding data field.



The screenshot shows the AncoraDocs Web Operator interface. On the left, a sidebar contains capture fields for an invoice. The 'SUBTOTAL' field is highlighted with a red background and contains the value '2014-01-03'. The 'AMOUNT DUE' field is also highlighted with a red background and contains the value '7662.60'. Two red arrows point from these fields to the corresponding values on the scanned invoice in the main panel. The invoice is from WorkSafe BC and includes contact information for Payment Services. The bottom section of the invoice contains fields for service recipient and therapist information.

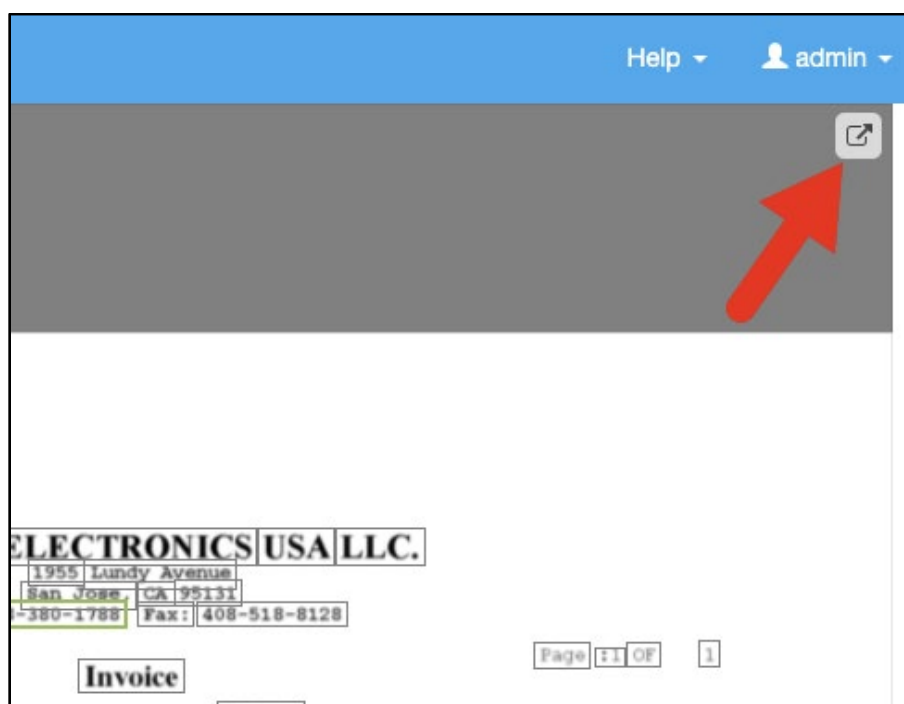
Explore the document more closely

Use the controls in the upper-left corner of the document panel to zoom in or out and move across the document—left, right, up, and down. Click the small **X** to reset the document view.



Move document view to a separate window

In Data Verification, the document view panel now includes a small popout button in the upper-right corner.



Click this button to move the document view out to a separate window. You can move this separate window anywhere, including a secondary display (see the figure below).

Document Type

Invoice Lab 1

VENDOR OCR

408-380-1788

VENDOR NAME

LEOTEK ELECTRONICS

VENDOR STREET

VENDOR ID

12345

DATE

10/12/2017

REF NO

4109023841

PO N

0946-SA9216880

DEPT CODE

0946

SUBTOTAL

129384.00

SHIPPING AND H

AMC

C

TIME

ancoraDocs Online

https://sso-demo.ancoradocs.com/DataVerifier/ImageViewStandalone/3ff2abf9-5b9b-452f-a231-9a1596725d1a

LEOTEK

LITE-ON GROUP

LEOTEK ELECTRONICS USA LLC.

1955 Linden Avenue

San Jose, CA 95131

Tel: 408-380-1788 Fax: 408-518-8128

Bill-to

Invoice

Ship-to

Page 1 of 1

Invoice Date: 10/12/2017

Invoice No: 4109023841

Customer No: 41041 All Phase Electric

Invoice To: 0946 SA9216880

Invoice From: 0946 SA9216880

Invoice Date: 10/12/2017

Invoice Time: 10:00 PM

Invoice User: P.00000000

ITEM	PART NO/DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
1	GCM200000217 GCM2-308-80-40W-38-GY-700-PCB7 S/N1917A004508-B17A005106 COVOTE 10218924895 5	599	216.00	129,384.00
SUBTOTAL: (1293)				129,384.00
OFFICE (1293)				129.00
FREIGHT (1293)				129.00
TOTAL TAX: (1293)				129.00
TOTAL INVOICE AMOUNT:				129,384.00

All Part due Invoices are subject to 1.5% late payment penalty

Remark: Please remit payments to our lockbox:

LEOTEK ELECTRONICS USA LLC

P.O. BOX 783

FREMONT CA 94537

Authorized Signature

Verifying data

There are two types of data verification that you may need to perform, *verifying regions of low confidence* and *invalid data*.

Verifying a region with low confidence

For any case in which there is uncertainty that a text region has been precisely located on the page— or that the OCR engine incorrectly interprets text—the field value appears in red.

TAX	0.000
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Any data field that the ancoraDocs data capture engine recognizes with high confidence and have high OCR character confidence scores will display the text in black color.

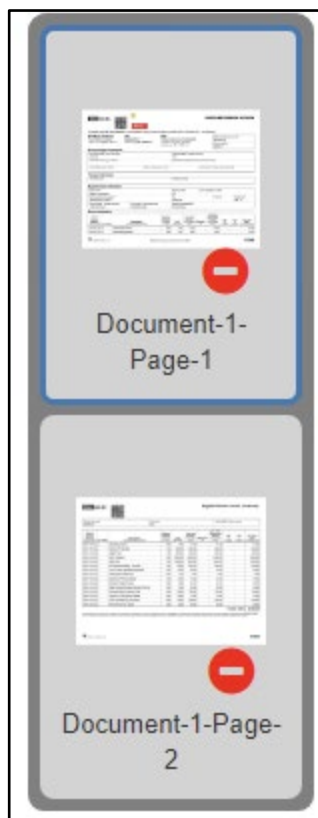
VENDOR	Worksafe BC
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Invalid Data

There are several reasons why a field may be invalid:

2. Mismatch with the formula - the value may not match the value from the formula.
3. The value captured doesn't match a value in the defined list.
4. A required field is empty.

Hard-validation stop — If the system fails to capture a required field, or the system captures a field incorrectly and it breaks a validation rule, the field appears with a solid red border so you can easily notice it and work to fix it. If even one field is invalid, the document thumbnail is marked with a red icon.



NOTE: It is not possible to submit the batch until all hard stop validation issues are resolved and each document thumbnail contains a green check mark.

A solid red border indicates a hard-validation stop. Hover over the field to see its description.

VENDOR NAME

VENDOR ID

The field VENDOR NAME is required.

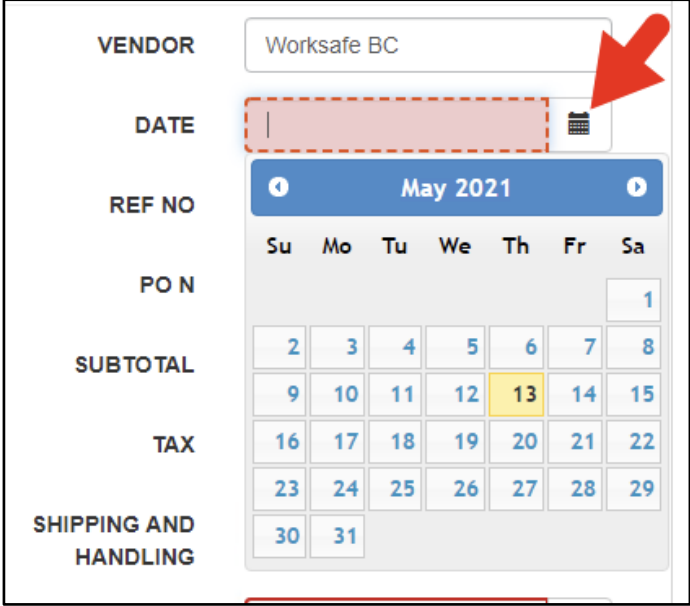

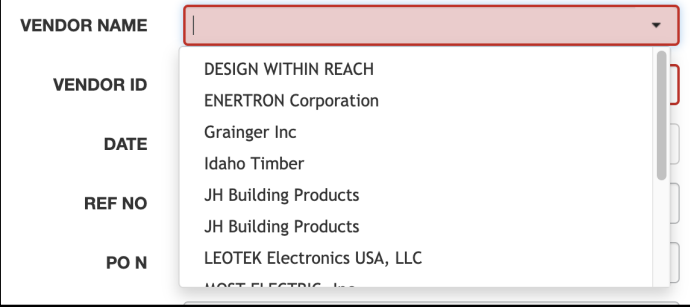
Soft-validation stop — There are also occasions where a field will exhibit a dotted red border, which indicates a soft validation stop. The field value breaks a validation rule, but you can accept the value by pressing **Ctrl+Q** on the keyboard. This will remove the dotted red border. If this field is the only field with a dotted

red border, then accepting the field value will turn the document icon from the yellow caution icon to the green checkmark icon.

INVOICE NUMBER

Selectable and calculable fields

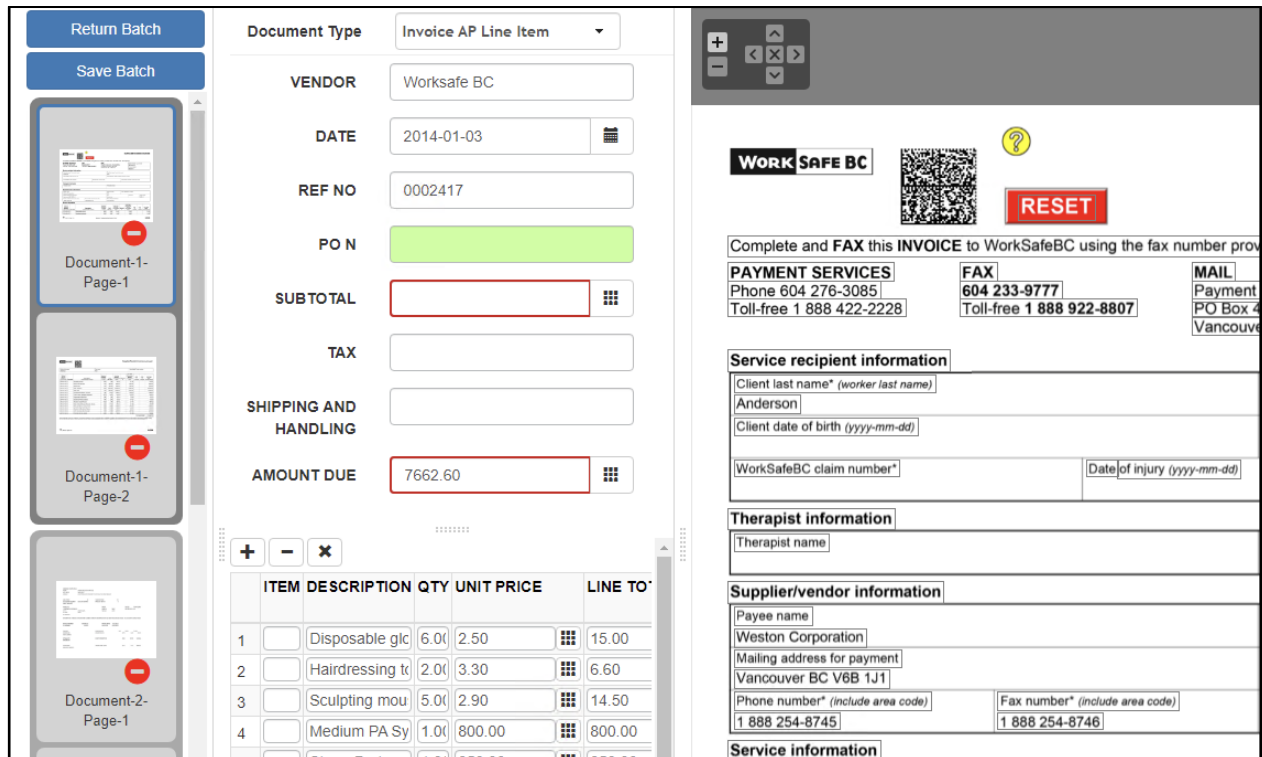
Some capture fields will contain a button that helps to specify the correct value.

<p>Date — click the small button to display a drop-down calendar from which you can select a date.</p>	
<p>Calculate — click the small button to calculate the value according to the predefined formula.</p>	
<p>List field — click the small drop-down arrow to choose from one of the values.</p>	

Correcting a batch

Immediately after a batch loads the first page of the first document will appear in the main panel. The list of documents is shown on the left, and a list of data fields will appear in between, as shown in the figure below.

Notice that the first document is highlighted on the left side. In the example given below, the first empty field contains a green background color, and two of the fields have a red border.



Return Batch
Save Batch

Document Type Invoice AP Line Item

VENDOR Worksafe BC

DATE 2014-01-03

REF NO 0002417

PO N [Green background]

SUBTOTAL [Red border]

TAX

SHIPPING AND HANDLING

AMOUNT DUE 7662.60 [Red border]

ITEM	DESCRIPTION	QTY	UNIT PRICE	LINE TO
1	Disposable glic	6.00	2.50	15.00
2	Hairdressing tr	2.00	3.30	6.60
3	Sculpting mou	5.00	2.90	14.50
4	Medium PA Sy	1.00	800.00	800.00
5	Stage Bede	4.00	250.00	1000.00

WORK SAFE BC

RESET

Complete and FAX this INVOICE to WorkSafeBC using the fax number provided

PAYMENT SERVICES Phone 604 276-3085 Toll-free 1 888 422-2228

FAX 604 233-9777 Toll-free 1 888 922-8807

MAIL Payment PO Box 4 Vancouver

Service recipient information

Client last name* (worker last name) Anderson

Client date of birth (yyyy-mm-dd)

WorkSafeBC claim number* Date of injury (yyyy-mm-dd)

Therapist information

Therapist name

Supplier/vendor information

Payee name Weston Corporation

Mailing address for payment Vancouver BC V6B 1J1

Phone number* (include area code) 1 888 254-8745

Fax number* (include area code) 1 888 254-8746

Service information

Correcting invalid fields

An invalid field is a field that either has a soft-validation stop or a hard-validation stop, as given in the explanations above.

An invalid field may or may not contain a suggested value. Hover over the field to see an explanation of the error.

The screenshot shows a software interface with a table of items. The 'AMOUNT DUE' field is highlighted with a red border and contains the value '7662.60'. A red arrow points to a validation error message that reads: 'The 'AMOUNT DUE' value is not equal to '0' in formula 'FT_SUBTOTAL+FT_SHIPPING_COST+FT_TAX'.'. The table lists items with dates '2014-01-02' and quantities '2'. The items are 'CMC Charges', 'AWB Fee', and 'Talk N Learn Alphabet Keyboard'.



In the case here, **Amount Due** should be zero according to the formula. In the example document there is actually a dependency on the **Subtotal** field, as shown below.

The screenshot shows a software interface with a form. The 'SUBTOTAL' field is highlighted with a red border. Below it are fields for 'TAX' and 'SHIPPING AND HANDLING'. At the bottom, the 'AMOUNT DUE' field is highlighted with a red border and contains the value '7662.60'. The 'AMOUNT DUE' field is also highlighted with a red border.


Some validation errors correspond to other validation errors.

In this document, there is a hard-validation stop in Subtotal because there is no subtotal data field in the document. Click the calculate button to have the system automatically acknowledge this, and the **Subtotal** will be set equal to the **Amount Due**.


For the **Amount Due**, the red border will become black to indicate that it is validated.

SUBTOTAL	7662.60	
TAX	<input type="text"/>	
SHIPPING AND HANDLING	<input type="text"/>	
AMOUNT DUE	7662.60	

To correct an invalid field, click into that field and it will change to a colored background to indicate that this field has the focus.

AMOUNT DUE	7662.60	
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If the field contains a suggested data value, you can see the value highlighted with an orange box in the main panel. It may be necessary to click onto a different page of the document to locate this box.

AMOUNT DUE	7662.60	
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ITEM DESCRIPTION	QTY	UNIT PRICE	LINE
1 Disposable glc	6.00	2.50	15.00
2 Hairdressing tr	2.00	3.30	6.60
3 Sculpting mou	5.00	2.90	14.50
4 Medium PA Sy	1.00	800.00	800.00
5 Stage Parts	1.00	250.00	250.00
6 CMC Charges	2.00	2000.00	4000.00
7 AWB Fee	1.00	1400.00	1400.00
8 PW Bizweld M	7.00		630.00
9 Talk N Learn A	2.00		20.00
10 Papermate Pa	3.00		6.00
11 Electronic Pho	1.00	15.00	15.00
12 Wooden Giraff	3.00	11.90	35.70
13 Multi-Colored :	2.00	11.90	23.80
14 Portwest Mens	5.00	20.00	100.00

Invoice total*	\$7,662.60
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in accordance with the Workers Compensation Act and the Freedom of Information and Protection of Privacy

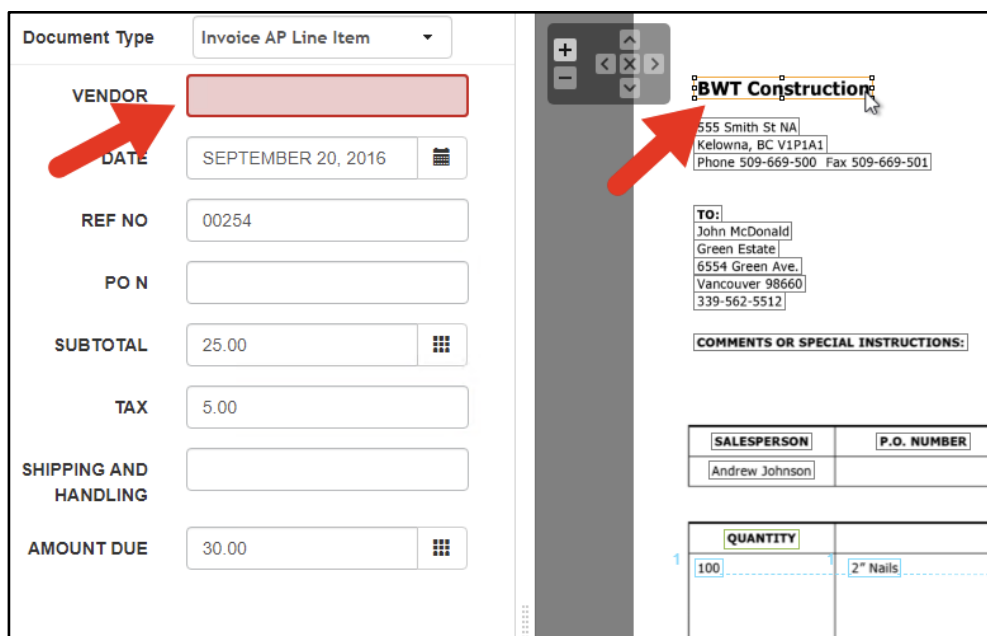
If this appears to be the correct value, click the small calculator button to accept that value. The field background will change to green.

The importance of graphical validation: Clicking on the data from the document is integral to the machine learning process. The Ancora system learns when a user clicks onto a field—or draws a box onto the document to identify adjacent features and semantic content. From these user actions, the system learns what is distinctive about that region of the document. Whenever possible, click on a box—or draw a box—of text to validate a field.

Selecting a box on the document

Sometimes, the system offers no suggestion for validating a data field. In many of these cases, a box can be found over the appropriate data field, and it is preferable to simply select that box.

Consider a case in which a Vendor field has a validation error, but no orange box appears in the document when you click into the Vendor field. Look for the box on the document which seems to represent the vendor data field. Then, click into the Vendor data field such that the background turns red in color, and immediately move over to click the box for the vendor data field on the document. The validation error will clear and you can continue to review the remaining errors in the other pages of the document.



The screenshot displays the AncoraDocs interface. On the left, a form titled "Document Type" (set to "Invoice AP Line Item") contains several fields. The "VENDOR" field is highlighted with a red background, and a red arrow points to it. Other fields include "DATE" (SEPTEMBER 20, 2016), "REF NO" (00254), "PO N", "SUBTOTAL" (25.00), "TAX" (5.00), "SHIPPING AND HANDLING", and "AMOUNT DUE" (30.00). On the right, a document image is shown. A red arrow points to a box labeled "BWT Construction" which contains the address "555 Smith St NA", "Kelowna, BC V1P1A1", and "Phone 509-669-500 Fax 509-669-501". Below this, there is a "TO:" section with contact information for John McDonald at Green Estate, and a "COMMENTS OR SPECIAL INSTRUCTIONS:" section. At the bottom right, there is a table with columns "SALESPERSON" (Andrew Johnson) and "P.O. NUMBER". Below that is another table with columns "QUANTITY" (100) and "2" Nails".

Soft-validation errors

If you encounter any soft-validation errors (dotted red border), it is possible to ignore such errors and submit the batch. Check with your ancoraDocs administrator to understand your company policy on handling such errors.

DATE	<input type="text"/>
CREDIT REF NUMBER	<input type="text"/>
PO NUMBER	<input type="text" value="PO#: 34-27693-53816"/>
INVOICE NUMBER	<input type="text"/>

Drawing a region

The operator can also left-click on an area and draw a new region. All text within the region will be populated in the field automatically. Also, if a region is too large or too small, an existing region can be resized and the field will update with the OCR results present in that region.

The figure below depicts an example in which two hard validation errors relate to the error on the Vendor Name.

VENDOR OCR	<input type="text"/>
VENDOR NAME	<input type="text"/>
VENDOR ID	<input type="text"/>

The system can't resolve the vendor name on this document because the name is fragmented into several regions on the document.

TEK E-ON GROUP	
LEOTEK ELECTRONICS USA LLC.	
1955 Lundy Avenue	
San Jose, CA 95131	
Tel: 408-380-1788	Fax: 408-518-8128
Invoice	
Ship-to	
Phase Electric Supply - Burban	City of Los Angeles / PW St

In this case, you could choose an item from the drop-down. An even better option is to click into the Vendor Name field (so that it has the focus), and draw a box around the entire vendor name in the document.

TEK E-ON GROUP	
LEOTEK ELECTRONICS USA LLC.	
1955 Lundy Avenue	
San Jose, CA 95131	
Tel: 408-380-1788	Fax: 408-518-8128
Invoice	
Ship-to	
Phase Electric Supply - Burban	City of Los Angeles / PW St

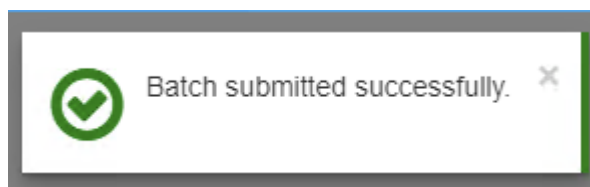
Save and submit a batch

When you're ready to submit a batch, check to see it has no hard-validation stops. Each document should have a green checkmark. Otherwise, you'll encounter an error message. Click the **Save Batch** button to save the batch and return to it later.

At any point, the operator may click the **Save Batch** button at the top of the page, which will save the current progress and status of the batch onto the server. Save the batch when verification is incomplete and you need to return to it later.

After clicking the **Save Batch** button, you can then click the **Return Batch** button to return it back to the server for another operator to complete.

If there are no hard-validation stops remaining, click the **Submit** button at the bottom of the page. After a moment, you should see a confirmation alert that the batch has been submitted.



Validation errors popup when attempting to submit a batch

When viewing a batch in Data Verification, if there are any validation errors when you click the **Submit** button, a popup will appear. You can see a list of the fields in each of the documents and a description of the error.

Document	Field	Description	
Document 2	FT_VENDOR_NAME	The VENDOR NAME 'PHILIPS LIGHTING ELECTRONICS N.A.' is not contained in the database.	—
Document 2	FT_GRAND_TOTAL	The field AMOUNT DUE is required.	—
Document 3	FT_VENDOR_NAME	The VENDOR NAME 'Soraa, Inc.' is not contained in the database.	—
Document 4	FT_DEPT_CODE	The 'DEPT CODE' value is not equal to '9999' in formula '/' This formula checks to make sure the PO Number is greater than 4 characters if so then it parse the "/" first for characters to get the Department code and if false then it sets the dept code to 9999 "/ IF(GREATER(STRLEN(FT_PON),4), STRLEFT(FT_PON,4), "9999").	—
Document 4	FT_SUBTOTAL	The field SUBTOTAL is required.	—
Document 4	FT_GRAND_TOTAL	The 'AMOUNT DUE' value is not equal to '20.64' in formula 'FT_SUBTOTAL+FT_SHIPPING_COST+FT_TAX'.	—

Close
Accept all soft validation warnings

Click on any of the fields to go directly to that field in the document to fix it.

Soft validation warnings will appear in this list with orange indicators. You also have the option to click **Accept all soft validation warnings**.

Training Checkmark Group Fields

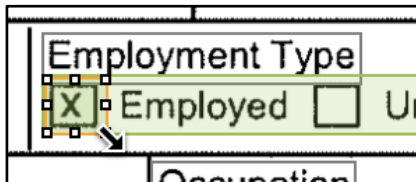
When a field is set up as a checkmark group field, it will be necessary to train the system to recognize each of the checkmarks/radio buttons.

Follow these steps:

1. On the document, zoom in closely on the group of checkmarks/radio buttons.
2. Draw a region that envelops all of the checkmark or radio buttons in the group. This large region defines the boundary of the checkmark group field.

Employment Type			
<input checked="" type="checkbox"/> Employed	<input type="checkbox"/> Unemployed	<input type="checkbox"/> Self-employed	<input type="checkbox"/> Military
<input type="checkbox"/> Retired	<input type="checkbox"/> Student	<input type="checkbox"/> Other	
Occupation	Length of Employment	Work Phone Number *	

3. In the popup window, zoom in to the group of checkboxes.
4. Click on the first choice in the list, then draw a small box on top of the first checkbox or radio button.



5. Repeat for each checkbox or radio button that corresponds with each field value.
6. When all checkboxes have been trained, a green checkmark will appear in the bottom left corner of the dialog box.
7. Click **OK**. The system will evaluate which boxes or buttons are populated and update the field value(s). If more than one checkbox or button is populated, a pipe "|" will be used to separate the field values.

[Watch a video](#) with an example of how to train a checkbox group field.



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[Contact Form](#)